

**ASSESSMENT OF LOCAL  
GOVERNMENT TRAINING NEEDS AND  
RESOURCES FOR HOUSING AND  
COMMUNITY DEVELOPMENT**

**Bulgaria, Hungary, Poland and  
The Czech and Slovak Republics**

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## **ABSTRACT**

As privatization of housing and urban development progresses in Central and Eastern Europe, a considerable amount of money and effort is being spent, with much more contemplated, to train local government officials in each of the five Central and Eastern European countries. As plans for further and more comprehensive training programs evolve, it is apparent that training programs and materials being developed for specific countries may be transferrable, with modifications, from country to country. It is also apparent that many organizations already have training initiatives that are similar to the goals of the USAID, and that, within the United States, there is a wealth of training programs that could be adapted, with modifications, for training and education programs in Central and Eastern Europe.

In an effort to ensure careful use of resources, we recommend establishing a singular training strategy for all the Central and Eastern European countries. This training strategy could include a multi-tiered approach to training that includes higher education, policy education, and ongoing professional development.

Although the Central and Eastern European countries are seeking assistance in many different areas, the main focus of training efforts thus far has been in the area of broad privatization and housing. As more reconnaissance missions are completed, it becomes apparent that many of the training needs have shifted from exclusively housing issues to broader subjects related to commercial land development, planning and regulatory issues, and urban economic development issues.

Using the basic framework of professional development seminars and workshops from associations and universities around the United States, courses could be revised and reworked, taking into account the existing situation in each country.

## EXECUTIVE SUMMARY

As privatization of housing and urban development progresses in Central and Eastern Europe, a considerable amount of money and effort is being spent, with much more contemplated, to train local government officials in each of the five Central and Eastern European countries (Bulgaria, Hungary, Poland, and the Czech and Slovak Republics) covered under USAID contract EUR 0034-C-002034-00. As plans for further and more comprehensive training programs evolve, it is apparent that training programs and materials being developed for specific countries may be transferrable, with modifications, from country to country. It is also apparent that many organizations already have training initiatives that are similar to the goals of the USAID, and that, within the United States, there is a wealth of training programs that could be adapted, with modifications, for training and education programs in Central and Eastern Europe.

In an effort to ensure careful use of resources, we recommend establishing a singular training strategy for all the Central and Eastern European countries, to be implemented on the basis of demand. This training strategy could include the following multi-tiered approach to training, that includes:

1. *Higher education*
  - Identification of appropriate higher education institutions for incorporating training programs
  - Curriculum assistance to existing and potential real estate related university programs
  - Faculty forum participation
  - Faculty training in case study method
  - Additional faculty education
2. *Policy education*
  - Policy forums between public and private sectors
3. *Ongoing professional development*
  - Seminars
  - Workshops
  - Participant training--study tours and study abroad

Among the recommendations specifically related to ongoing professional development are:

- a concerted effort to identify local institutions that can continue the training that USAID develops;
- more careful identification of audience participants for training; and
- incorporation of cultural considerations as a significant part of

curriculum development efforts.

Although the Central and Eastern European countries are seeking assistance in many different areas, the main focus of training efforts thus far has been in the area of broad privatization and housing. However, as more reconnaissance missions are completed, it becomes apparent that many of the training needs have shifted from exclusively housing issues to broader subjects related to commercial land development, planning and regulatory issues, and urban economic development issues. In addition to the existing housing related courses that have already been developed and offered by USAID, the following subject areas have been identified by USAID consultants, trainers, and country experts as priorities for education and training programs that could be offered in each of the five countries:

1. Market analysis and feasibility
2. Real estate development principles and process
3. Techniques for implementing public-private partnerships for real estate development
4. Municipal finance
5. Infrastructure development and financing
6. Environmental management
7. Economic development principles
8. Computer training
9. Land use planning strategies and methods
10. Citizen participation and approval procedures

While one of the strongest recommendations from consultants and trainers is that course materials need to take into consideration individual cultural issues, it is also apparent that the new courses could be developed from existing courses that can be found in the United States. Using the basic framework of professional development seminars and workshops from associations and universities around the United States, courses could be revised and reworked, taking into account the existing situation in each country. Among the organizations most likely to support existing courses--either for participant training purposes or for development/revision of other courses--are:

International City/County Management Association (ICMA)  
The Urban Land Institute (ULI)  
National Association of Realtors  
National Association of Housing and Redevelopment Officials  
The Urban Institute  
Home Builders Institute  
USAID Approved Courses  
Eastern Europe Real Property Foundation  
Planning and Development Cooperative International (PADCO)

Additional resources:

The International Union of Local Authorities-Eastern Mediterranean and Middle East Region (IULA-EMEE); Institute for Public Administration; ADEF--Association pour le Developpement des Études Foncières (Association for the Development of Land Studies; and numerous universities.

## TABLE OF CONTENTS

ABSTRACT .....	ii
EXECUTIVE SUMMARY .....	iii
TABLE OF CONTENTS .....	vi
INTRODUCTION .....	1
SECTION I: SUBJECT MATTER RECOMMENDATIONS .....	2
A.    Assessing training priorities .....	2
B.    Priority subject areas for training .....	3
SECTION II: IMPLEMENTING TRAINING AND EDUCATION ACTIVITIES .....	7
A.    A three-tiered approach to implementing education and training activities .....	7
B.    Special training concerns .....	10
SECTION III: RESOURCES FOR IMPLEMENTING EDUCATION AND TRAINING ACTIVITIES .....	12
A.    International City/County Managers Association, Washington, D.C. ....	14
B.    ULI--the Urban Land Institute, Washington, D.C. ....	15
C.    National Association of Realtors, Washington, D.C. ....	17
D.    National Association of Housing and Redevelopment Officials, Washington, D.C. ....	18
E.    Urban Institute, Washington, D.C. ....	19
F.    Home Builders Institute, Washington, D.C., and Gdansk, Poland ....	19
G.    USAID Supported Courses .....	21
H.    Additional Resources .....	22
SECTION IV: RECOMMENDATIONS FOR FOLLOW-ON ACTIVITIES .....	24
A.    Higher education .....	24
B.    Policy education .....	24
C.    Professional development programs .....	24
ANNEX A: PERSONS CONTACTED .....	26
ANNEX B: TRAINING SUMMARY .....	29

ANNEX C: BIBLIOGRAPHY .....	48
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## INTRODUCTION

As privatization of housing and urban development progresses in Central and Eastern Europe, a considerable amount of money and effort is being spent, with much more contemplated, to train local government officials in each of the five Central and Eastern European countries (Bulgaria, Hungary, Poland, and the Czech and Slovak Republics) covered under USAID contract EUR 0034-C-002034-00. As plans for further and more comprehensive training programs evolve, it becomes apparent that training programs and materials being developed for specific countries may be transferrable, with modifications, from country to country. It also becomes apparent that many organizations and countries have begun training initiatives that are similar to the goals of the USAID, and that within the United States, there is a wealth of training programs that could be adapted, with modifications, for training and education programs in Central and Eastern Europe.

This report brings together information about 1) training and education programs directed at local public officials that have already taken place or that are being planned; 2) additional resources available; and 3) additional programs that should be developed. This report addresses the following issues:

- Section I*      Subject matter recommendations: training priorities recommended by USAID consultants, trainers, and country specialists
- Section II*     Implementing training and education activities
- Section III*    Resources for implementing education and training activities
- Section IV*    Recommendations for follow-on activities



## **SECTION I: SUBJECT MATTER RECOMMENDATIONS--TRAINING PRIORITIES RECOMMENDED BY USAID CONSULTANTS, TRAINERS, AND COUNTRY SPECIALISTS**

### **A. Assessing training priorities**

In order to assess overall training needs and make recommendations for delivery of future training, we spoke with a wide variety of USAID consultants, trainers, and country specialists (see Annex A for a complete listing of people contacted) who have been working on Central and Eastern European issues to assess what education programs have been offered, what are being planned, and what they recommend for future presentation (see Annex B for a comprehensive listing of programs offered and planned). In addition, we reviewed strategy papers written for ICMA. There was a surprisingly high level of consensus about training priorities for the five countries. The problems and needs appear to be very similar in all of the countries, which have a common economic and political heritage. And even though each country may be at a slightly different stage of development, much of the same training is needed or will ultimately be needed.

Thus far, most education programs have focused on policy reform and issues of privatization as well as issues related specifically to housing, such as housing finance, reform, management, and rent control. In light of the chronic housing problems of Central and Eastern Europe, that focus was much needed. While those courses to date have been useful, the training needs appear to have broadened to include larger issues, such as commercial land development, economic development, and management strategies for new government functions. The additional recommendations for future delivery that are outlined below are primarily related to broader development and city land management issues and are not specifically housing related. Those recommendations are reflected in this section.

Recommendations for country-specific training programs are beyond the scope of this report. Although training for USAID projects is demand-driven, this report is written with the assumption that there is interest in preparing a core set of courses that could be revised for each country and presented as a demand is identified. These recommendations are for a complete "curriculum" in land and development education, based on reports and interviews with consultants and trainers, as well as recommendations by ULI education specialists. This curriculum would not be presented in toto in each country, rather, it would be adapted to suit the demand identified in each area. These courses are recommended in addition to those already existing courses specifically related to housing.

## **B. Priority subject areas for training**

In most of the recent missions to Central and Eastern Europe, training and education recommendations have evolved as a result of work done by consultants and requests from city officials. Most prevalent among those are the following ten topics:

1. Market analysis and feasibility
2. Real estate development principles and process
3. Techniques for implementing public-private partnerships for real estate development
4. Environmental management
5. Municipal finance
6. Infrastructure development and financing
7. Economic development principles
8. Computer training
9. Land use planning strategies and methods
10. Citizen participation and approval procedures

Throughout most of the interviews conducted and reports reviewed, the following topics were most often identified as highest training priorities for each country from among the ten listed above: market analysis and feasibility; real estate development principles and process; techniques for implementing public-private partnerships for real estate development; environmental management; and municipal finance.

Below is a more complete description of each priority area.

### **1. *Market analysis and feasibility***

As the Central and Eastern European economies are being transformed into market-based systems, it is evident that a new way of thinking about land development needs to accompany these market changes. Among those changes is the need to look at development in the context of market demand and how to project demand. To that end, a comprehensive market analysis course is much needed in both the public and private sectors. Under the heading of market analysis, topics might include gathering appropriate data and analyzing demand and feasibility, pro forma financial analysis for development-project review, demographics, data collection, and projection, and also project characteristics, location, configuration and mixed-use development.

### **2. *Real estate development principles and process***

The need has been stated repeatedly--for the private sector as well as the public sector--for training in the area of real estate development principles. There is strong interest in looking at the role of an entrepreneurial developer--the process that starts with inception of an idea to final sales and management issues. At a minimum, such training would cover feasibility, contract

negotiations, formal commitments, construction, completion, and asset and property management. It is as important for the public sector, which will be working with private developers, to understand this process as it is for new developers. In the United States, the public sector has benefitted greatly from training in real estate development principles and processes through continuing education programs and university courses. By understanding the goals and needs of the private developers, the public sector can take a more active and responsible role in development projects.

### *3. Techniques for implementing public-private partnerships for real estate development*

Local governments in parts of Central and Eastern Europe are being approached by private developers who make proposals to them to develop a project on city or district owned land. Local governments are now concerned about losing potential revenues in their haste to encourage growth and development. This training program would need to be a very detailed look at agreements with private-sector developers that would encourage profitability for both parties. Among the issues that would need to be covered would be writing RFPs and evaluating responses to RFPs; evaluating pro formas; negotiations with private-sector partners; types of partnerships; and levels of contribution to partnerships (through land, infrastructure, tax policies, money, various ways profits are distributed, borrowing authority, regulations and expertise).

### *4. Environmental management*

The state of the environment in Central and Eastern Europe is for the most part lamentable and a source of concern to all of Europe. As environmental controls are being added, training is needed in how public planners should administer and implement environmental policies. In addition, learning how to judge projects from a planning standpoint on the basis of their environmental impact is also needed, macro level-state concern, and the micro level-local concern.

### *5. Municipal finance issues relating to urban development*

One of the most significant changes in the transition to a market economy is the increase in responsibility at the local level for infrastructure and service provision, but without the financial resources to provide them.. Cities and districts throughout Central and Eastern Europe are faced with the responsibility of generating new methods of financing urban development. Among the topics that a course in municipal finance could cover include: operating and capital budgeting project feasibility analysis; mechanisms for revenue generation and cost-recovery; and evaluation.

### *6. Infrastructure development and financing*

For most countries, capital is a problem, yet infrastructure development, improvement, and maintenance is a pressing need, particularly if there is to be future development. There is much interest in and need for information on how urban infrastructure and other public amenities can be financed and developed innovatively. In particular, the legal, financial, and administrative

issues involved in infrastructure cost sharing between the public and private sectors should be addressed.

#### *7. Economic development principles*

City officials have asked for assistance in preparing economic development strategies. There is a need for instruction in the process of preparing an economic development plan and its implementation; including establishing goals and objectives; identifying and defining roles and responsibilities of various players at the local government level and the private sector; collecting and analyzing data; setting municipal finance goals; planning and development control of new projects; and defining financial incentives.

#### *8. Computer training*

Many local governments and universities have now been given or have purchased sophisticated computer equipment with software such as computer-aided design drawing (CADD), geographic information system (GIS), and various mapping and analysis programs. While training in the use of computers and their software has already taken place in most cases, additional training in data analysis and land use applications and strategies is much needed at the city level as well as by university students for research and future job skills. This is a course that could be easily added to a university curriculum.

#### *9. Land use planning strategies and methods*

Land management, urban planning, and infrastructure development responsibilities have been undergoing changes and assistance is needed in establishing a structure for those responsibilities. A seminar of this nature would cover such topics as urban planning in a market economy, land use controls and area planning, the development of strategic plans, master planning issues, zoning, subdivision planning, covenants, and conditions and restrictions (CC & Rs). The course should also address how urban planning is integrated into other city departments.

#### *10. Citizen participation and approval procedures*

As development brings changes to cities, citizens' and local activist groups' involvement in the development process will increase. Education is needed for the public sector (and perhaps the private sector) on how cities can work productively with citizens groups through negotiation and consensus building. The goal of such education would be to achieve meaningful community input and government transparency and accountability.

## SECTION II: IMPLEMENTING TRAINING AND EDUCATION ACTIVITIES

Section II is comprised of two parts: A. A three-tiered approach to implementing education and training activities; B. Special training concerns.

### A. *A three-tiered approach to implementing education and training activities*

We recommend an approach to implementing education and training that would be multi-tiered, including higher education, policy education, and ongoing professional development.

#### 1. *Higher education*

Working with universities or institutions of higher education provides, at a minimum, two long-lasting results. The first is broadening the existing architecture and/or planning curricula, which in most Central and Eastern European countries is the only real estate related higher education available, or developing a completely new planning and real estate development curriculum. Many publicly employed architects play several roles--that of planners, developers, urbanists, and architects. It is clear that new planning and development skills will be needed by architects and others responsible for planning and development in a market economy. Working with universities to expand the notion of a planning and development education can ensure that the next generation of local government officials will have a broader perspective on planning, development, real estate issues, and even architecture issues.

The other main reason is to ensure the institutionalization of training. In all areas of education and training, ensuring its repeated presentation is an essential part of the investment for curriculum development. Institutionalization of training through universities is one way to ensure its continuation and growth. Universities have the framework in place that can assure regular offerings of courses and are typically more likely to endure than private training institutions might be. In addition, it assures the institutionalization of research programs to further planning and development research. With all the changes taking place in Central and Eastern Europe, revision of university curricula is a high priority in almost all subject areas. And universities are looking at the United States approach to higher education as a model. The addition of planning and real estate courses at this time is an important part of the overall curriculum revisions.

We recommend that a minimum of one university in each country (in Poland, because of its size, at least two or three universities) be identified and subject matter experts/academics be chosen to work with them to integrate a series of courses into existing curricula, most probably in planning and architecture programs. These courses would be developed by the universities themselves, with expertise and assistance from United States academics and practitioner experts, and based on the seminar and workshop training developed for ongoing continuing education programs (see Section III). Such work is already underway at the Technical University of Gdansk, which is receiving curriculum assistance from Harvard University, financed by USAID. It is important to note that care should be taken to assess probable future demand so as to avoid

establishing too many programs and stretching resources too thin.

In addition, we recommend identifying key individuals at the universities who would be involved in redesign and enhancement of curricula, who could, as part of *their* education and training, be brought to the United States to spend a semester or a summer at a model real estate development or urban planning program to improve their understanding of the issues and to see first-hand how topics are incorporated into a curriculum. Another way to satisfy the need for educating faculty would be to bring them to the United States for a higher level continuing education program such as the ULI Real Estate School to offer them a short but intensive program on topics such as market analysis and real estate development/

In addition, establishing a faculty forum for Central and Eastern European and North American real estate faculty would provide an opportunity for dialogue that could be a valuable learning experience for all participants. Because many North American real estate related programs are also fairly new, the lessons learned are fresh and could be useful to universities that are establishing new programs. The faculty forum also serves as a means of sharing research agendas among universities. Opportunities for such a forum exist in conjunction with the annual ULI faculty forum (held at every ULI fall meeting); the American Real Estate Society's (ARES) annual meeting held every April; the American Real Estate and Urban Economics Association (AREUEA) annual meeting in January or their annual international conference in October/November.

Another role for higher education would be in the development of teaching cases based on actual USAID or World Bank funded Central and Eastern European technical assistance projects. Much business, real estate, and planning education in the United States centers around the case study method. Should this teaching method become part of the Central and Eastern European curricula, we recommend that as a means for developing cases there be a link established between technical assistance projects and training. As development projects are funded and underway, an academic should be involved, either as an expert consultant or simply as an observer, and he or she be financed to write a country-specific case about that project. In that way, each country can build up a corpus of case teaching materials and information about funded projects, that can serve as models for other cities or countries, and can be easily distributed. In some instances, country specific cases may be usable in the other four Central and Eastern European countries. Among the possibilities would be, for example, if as was recommended in the field mission report to Budapest, a public-private development corporation is created at Lágymányos, that process could be written up as a case study that could be used for instructional purposes. ULI also has a course for faculty on teaching by the case method, in which faculty are taught how to write and use case studies in their courses. This might be considered for Central and Eastern European faculty.

## *2. Policy education*

Initial training efforts are geared mostly toward the transition of the countries to market economies. In Poland, for example, many policy reform seminars have already taken place. And

the need is now greater for technical how-to information. However, along the way, as change is taking place, maintaining a dialogue between the public and private sectors is a critical element. One effective way to facilitate communication between the public and private sectors is by organizing policy forums.

A policy forum is a small meeting of carefully selected individuals who are invited from the public and private sectors to have a discussion about national concerns each group has and the means available for resolving possible conflicts. The objective is to improve the understanding of land use policy issues and foster an improved environment for decision making. Information that comes out of the policy forums should then be distributed, either in the form of a book or a paper. Because many of the land use policy issues are similar from city to city, distribution of the proceedings should be an essential part of any policy education program.

ULI has been holding policy forums for many years and has found them to be a genuine contribution to furthering understanding of complex urban problems.

### *3. Ongoing professional development programs*

Professional development programs will inevitably be the largest piece of training activities under this contract. In order to make the best use of the money earmarked for training, it is worthwhile to plan a complete professional development program. In so doing, educational goals must first be established and then an educational format identified that is most consistent with the goals.

Primary in the planning process is identifying the audience for whom the programs are being developed. Only then can appropriate material and information be developed into successful professional development courses. Among the most common formats for such education are: seminars, workshops, and participant training, which in this case includes study tours as well as attendance at educational events in the United States (or at least outside of the country).

Training formats can be designed with specific audiences in mind. These formats would be the means of identifying who should attend an event and what the education purpose of the event is. For example, seminars could be one-day events oriented toward high-level officials, including elected officials, dealing with topics in a broader fashion, encouraging exchange among participant districts/cities/countries on specific problems and situations in their jurisdictions.

Workshops could provide training in a specific task or procedure, such as market analysis methods and forming strategies for economic development. These training workshops would be intended for lower-level government officials who would actually be implementing the operations or supervising them. Workshops would also typically need to be longer than one day. So, instead of offering a how-to seminar on market analysis for high level officials, there might be a one-day seminar on how analyzing the market can be useful in developing a city's economic development

plan and long-range forecast. A three- or four-day workshop on how to conduct market analyses could be offered for city employees who would be either doing the analysis or supervising its execution.

A third training component, participant training, would take the form of either study tours or attendance at workshops held abroad. For example, study tours, oriented toward mayors or other high-level local decision makers, are a useful means of expanding vision and understanding as to what types of development can be achieved. Attendance at workshops held in the United States is also a useful way of helping a select group of people to understand basic principles of a particular subject that they can then try to apply to their own situation.

Implementation of on-site professional development programs is best done by establishing strong connections to local organizations that can function as the training centers. One-time offering of courses is an expensive proposition and will never come close to reaching the number of people who need to receive training.

Consultants have proposed a variety of options for affiliation with likely training institutions in different countries and cities. In Poland, for example, most training has taken place with the cooperation of the Regional Training Centers of the Foundation in Support of Local Democracy. In the Czech and Slovak Republics, USAID consultants have been working with the Association of Towns and Cities. Once these associations are identified, local experts affiliated with the training institutions can either identify people or can work directly with the consultants from USAID who will be developing curriculum materials.

Courses are most successful when connected in some way to technical assistance projects. Without connecting those courses to ongoing technical assistance needs, there is less of a chance of their being a useful context for these educational endeavors and less likelihood that they will continue to be offered.

## ***B. Special training concerns***

In discussing training and education experiences with people who have been working in Central and Eastern Europe, two primary issues were frequently raised that need to be incorporated into future training to ensure success: Any program used in the area must 1) clearly identify the audience; and 2) consider cultural factors more carefully.

### *1. Defining the audience*

Identifying the proper audience has become one of the biggest deterrents to offering successful training programs, according to people who have worked in Central and Eastern Europe. The ULI repeatedly heard the charges that "we didn't really know who the audience



was" and "it wasn't clear why everyone was there." If audience participants do not have similar educational goals, it makes it more difficult to tailor training to their needs and to keep participants interested. In as much as it is possible, training should be limited to individuals in the government who are assigned by their superiors to become an expert in a particular area. A much more systematic identification of the appropriate participants is needed in order to carry out a solid public-sector training program. Much of the problem is also due to the state of flux that many government agencies are in. Until their responsibilities and strategies are more clearly outlined, it may be difficult to have a clear-cut idea as to who should receive what training, but every effort should be made to systematize the invitation process as much as possible.

## 2. *Cultural considerations*

Trainers from all groups--USAID-funded, European-funded and others--expressed firm belief that future training programs no longer need to be discussions of how things are done elsewhere. Central and Eastern Europeans have been bombarded by American and European groups telling them how things are done in their own countries. While that may be interesting, it very quickly loses any take-home value that existed. Officials have had many opportunities to attend interesting, well-planned programs and sessions and then return to their jobs and continue to do things as they always have. To avoid that problem, consultants recommended that extensive upfront work be done to understand how the information to be taught fits into the country's existing situation. Teaching cases should be from Central and Eastern European countries, not the United States, because there is usually little relation to how things are done here and to how they will ultimately be done in Central and Eastern Europe. However, the teaching framework, or approach, from a pedagogical standpoint, may be transferrable, and for that reason, there are many valuable courses used in the United States that could be used as the basis for courses produced for Central and Eastern Europe use.

### **SECTION III: RESOURCES FOR IMPLEMENTING EDUCATION AND TRAINING ACTIVITIES**

As real estate and related education has been underway in the United States for quite some time, there already exists a vast array of course offerings that could serve as the basis for courses to be offered in Central and Eastern European countries. All levels of intensity, depth, and quality are available from many different sources, such as trade associations, nonprofit research associations, university continuing education programs, degree programs. Among those that ULI has investigated, we recommend a closer look at the courses and/or organizations identified below. These organizations and courses were chosen on the basis of their reputation for quality, indepth training, as well as their access to subject matter experts. While it is clear that much material would have to be revised and reworked to fit the country needs and problems, a framework for approaching the teaching of a topic exists among already established courses. It is within that framework that new material could be added to suit the education needs and political situations of each country. However, as indicated in Section I, it is not sufficient to simply take American courses and add Central and Eastern European cases. More direct work with Central and Eastern European experts and educators must take place up front.

Below is information about some of the organizations that offer quality programs and courses related to training needs in Central and Eastern Europe. Please note, however, that most of these are oriented toward the private sector and would have to be revised to accommodate local government officials. We have also attempted to match recommended priority subject areas for training with courses already in existence.

1. *Market analysis and feasibility*
2. *Real estate development principles and process*
3. *Techniques for implementing public-private partnerships for real estate development*
4. *Municipal finance*
5. *Infrastructure development and financing*
6. *Environmental management*
7. *Economic development principles*
8. *Computer training*
9. *Land use planning strategies and methods*

10. *Citizen participation and approval procedures*

Keep in mind that the courses listed below reflect only a sampling of what each organization has available. Should other priority areas be identified, additional courses that are not contained within this report might be available through these associations.

**A. *International City/County Managers Association, Washington, D.C.***

ICMA has developed, with USAID funding, at least four four-day courses that have been successfully offered in Poland:

Property Valuation

The purpose of the property valuation seminar was to train Polish municipal specialists and senior decision makers in related organizations on property valuation in a market economy. The seminar presented a set of creative solutions for Polish case problems, and outlined an agenda for the evolution of the Polish property market. It covered the following topics: discussion of real estate in a market economy; the factors affecting real estate value in a market economy; the valuation of individual properties; and the transformation of Poland's real estate market.

Land Use Planning (9)

The purpose of the seminar was to inform about the process of land use planning in a market economy. The main topics covered by the seminar included planning in a market economy, land use controls and area planning, planning and financing infrastructure, citizen participation in planning, and the development of strategic plans.

Communal Housing Management

The seminar was intended to inform local government officials and communal housing managers about the emerging issues in the management of communal housing. The main topics included: the theory and analysis of housing systems; changing responsibilities of Polish local official and housing managers; communal housing management technology and costs; and relative advantages of public and private organizational structures.

Local Revenue Sources (4)

This seminar addresses alternative revenue sources for housing and related infrastructure in a market-oriented economy; determining the advantages and disadvantages of alternative revenue sources; determining local community preferences and gaining public support for the introduction of new taxes and fees; controlling the costs of revenue administration and enforcement; and designing revenue structures that promote economic growth while providing sufficient revenues to meet local budget needs.

These four courses have all been extensively evaluated and reviewed. They were developed with much up-front work--with consultants/trainers travelling to Poland and Polish counterparts coming to the United States--and they include an important component for training of trainers. Course development has been well funded and without much more funding, the

courses could be adapted and revised for other Central and Eastern European countries. We would recommend that they continue to be offered. Note that two of the courses fall within the training recommendations identified in this report.

***B. ULI--the Urban Land Institute, Washington, D.C.***

ULI's focus has been primarily on training in all aspects of real estate development with an emphasis on an interdisciplinary approach, that takes into account the public and private sector's interest in development. ULI has at least two long-established training programs that could well be revised for Central and Eastern Europe: the Real Estate School and the workshop programs. The ULI Real Estate school is a series of 10 four-day intensive graduate level courses that together comprise a complete real estate development curriculum. Among the courses most relevant are those listed below:

Real Estate Development Process, Part I and Part II (2)

These four-day courses provide a fundamental understanding of the principles and concepts involved in developing real estate. Designed to help participants understand how various elements of a project are integrated, the courses stresses the significance of their interdependencies, and how they affect the viability of a project. The courses cover fundamentals of financial analysis techniques, market analysis, forecasting, property and asset management, market research, construction, design engineering issues, among other issues.

Advanced Development Process: Residential (2)

This course explores one particular type of development (in this case, residential) in depth from conception to completion. Topics are looked at in the context of residential development and include market analysis, site selection analysis, land use regulations, site planning and design, construction management controls, detailed pro formas, financial analysis, leasing, and devising a project management plan.

Market Analysis (1)

Four aspects of market analysis are covered in this course: forecasting ) estimating basic macroeconomic, demographic, and social trends; feasibility ) estimating the market demand for a specific type of product in a particular location; marketability--examining specific design, locational siting, and leasing concerns; and retention/expansion--keeping old tenants or attracting new ones by improving a property in response to changing market conditions.

Understanding Land Planning and Site Design (9)

This course examines land use design and site preparation issues and covers the

gamut from regulatory issues to transportation to landscape and public image. Participants learn how to evaluate sites and use new technology in their work.

#### Real Estate Finance (4)

This course covers the basic aspects of construction and permanent financing and how to anticipate future cost and availability of mortgage money. Valuation methods, evidence of value, and appraisal of income property are also discussed as are the intricacies of financial instructions and calculating comprehensive cash flow analysis.

#### Real Estate Financial and Investment Analysis (4)

This course goes into more depth and introduces the fundamentals of project investment analysis and shows how market analysis and investment analysis are used in feasibility studies in making investment decisions. Real estate transaction structuring, equity investment, and rate of return are among the many issues that are covered.

The workshop series consist of two-day programs designed to take participants through the steps of a real estate topic. Among those of probable interest to Central and Eastern Europeans are:

#### Basic Real Estate Development (2)

This workshop explores development of various product types--multifamily, residential, office, industrial, and retail. Topics include site selection, market and site feasibility studies, finance, design, construction, marketing, leasing, asset management, and getting approvals.

#### Development Fees: Infrastructure Cost Sharing (5)

This workshop explores options for local governments and agencies for financing improvements for roads, sewer and water systems, parks, schools, drainage systems, and even police and fire facilities. The program looks at the public perspective on developer financing of infrastructure.

#### Financing and Investing in Real Estate Projects (4)

This workshop focuses on financing projects in the range of \$5 million to \$50 million. It covers financing sources, alternative debt structures, yield requirements, and equity and capitalization rates. It also examines techniques for joint ventures, presales, sale/leasebacks, securitization, credit deals, and leveraged buyouts.

ULI's seminar programs cover a wide array of topics. Among those of probable interest are:

#### Wetlands and Real Estate Development (6)

Developing property that affects wetlands areas involves extreme caution to minimize costs and avoid legal problems. This seminar covers ways to avoid problems through design and mitigation techniques.

Trends in Developing Master-Planned Communities (9)

This course covers trends in master-planned communities and their advantage in packaging development approval, privatizing growth management, by comprehensively addressing environmental concerns, and by learning new approaches to community infrastructure, financing, and amenities.

Developing High Density Housing (9)

This course provides a realistic assessment of the role that higher-density housing can play in minimizing pressing urban development problems, such as traffic congestion, air pollution, and sprawl. Cost-efficient techniques for designing and building affordable housing and learning to assess the market are among the major points of discussion.

Winning Public Support for Development (10)

Increasingly, public approval for development projects includes support from neighborhood residents, special interest groups, and the media. This course covers techniques and approaches to gaining community acceptance through community relationship programs, media campaigns, and neighborhood involvement. Other techniques include targeted surveys, focus groups, citizen-based charettes, and negotiated community amenities.

ULI has expressed an interest in working with USAID in adapting these programs for use in Central and Eastern Europe.

***C. National Association of Realtors, Washington, D.C.***

NAR has a number of affiliates who offer quality training primarily to the private sector. Of particular interest is the training offered by the Institute of Real Estate Management (IREM) and Commercial Investment Real Estate Institute (CIRES). IREM has been particularly successful and well recognized in the industry for the courses it offers for the Certified Property Manager program. This program is considered to be among the finest certifications that can be earned by real estate professionals. Most of IREM's courses, however, are not in the priority training areas established in this report, however, they may be of more interest for private sector training, particularly:

Marketing and Management of Residential Property

Professional Management of Government-Assisted Housing

Managing Real Estate as an Investment

Problem Solving and Decision Making for Property Managers  
Leasing and Management of Office Buildings  
Introduction to Commercial Property Management  
Introduction to Apartment Management.

IREM has expressed interest in working with USAID through the Central and Eastern European Real Property Foundation.

The CIREI specializes in education and development for real estate professionals who are "buying, selling, exchanging, leasing, financing, developing, or syndicated commercial...real estate for clients." Among their courses that might be of interest are:

Market Analysis for Commercial Real Estate (5 days) (1)

This course covers market analysis tools for commercial real estate. Among the topics covered are analyzing demand and supply; using geographic information systems (GIS); identifying and evaluating opportunities; location and site analysis; analyzing residential uses, retail uses, office uses, and industrial uses.

Financial Analysis for Commercial Real Estate (5 days)

This course covers basic financial analysis issues, in particular real estate markets and analysis; valuation of real estate; estimating and forecasting net operating income; investments and investor behavior; time value of money; real estate cash flow model; measuring past and potential investment performance; financing real estate; and real estate taxation.

Advanced Techniques in Marketing Commercial Real Estate (4 days)

This course gives background in advanced techniques in brokerage and leasing and financial analysis of user transactions. Among the topics covered are: the brokerage process; preparing marketing plans; solving marketing problems; the user decision process; comparing spaces and leases; comparing leasing and owning alternatives; using information and marketing information systems; and integrating the brokerage process.

CIREI has expressed possible interest in working with USAID through the Central and Eastern European Real Property Foundation.

***D. National Association of Housing and Redevelopment Officials, Washington, D.C.***

NAHRO offers a number of public housing management courses and one of their trainers (Veronica Bukowski) has already been involved in curriculum development for USAID. While none of their existing courses are directly related to priority training areas established in this report, there are a number that may be of interest for housing management, such as



Housing & Community Development Skills for Commissioners (2 days)  
Training & Certification for Public Housing Managers (4 days, plus a one-day certification exam)  
Management Evaluation and Improvement System/Public Housing Management Assessment Program (3 days)

NAHRO has expressed interest in working with USAID.

***E. Urban Institute, Washington, D.C.***

Among the programs that the Urban Institute has already organized with USAID money is a very successful presentation of an asset and property management course. This 15-hour course was designed specifically to train in principals of asset and property management for people involved in a transition to a market-based economy, emphasizing the need for monitoring housing stock and systematizing management procedures, something that has been sorely lacking from most Central and Eastern European management. This course was presented in Szolnok, Hungary, but could be revised for other countries.

OKM Associates of Boston has also worked with the Urban Institute in developing management courses as well as creating drafts of two manuals based on training and technical assistance that had been provided. The purpose of the manuals was to serve as a resource guide for government officials and housing developers/managers. They are:

Volume I: Handbook for Municipal Governments

- A. Strategic planning
- B. Privatization: a guide to asset disposition
- C. Conversion to private management
- D. Housing stock management) asset management

Volume II: Handbook for Housing Management Companies

- A. Occupancy management
- B. Financial management
- C. Facilities maintenance management

Completion of the manuals is subject to additional funding and depending on the quality, could be a valuable resource for training.

***F. Home Builders Institute, Washington, D.C., and Gdansk, Poland***

USAID, in cooperation with HBI, is establishing an American-Polish Home Builders Institute (APHBI) in Gdansk. APHBI is intended to be self-sustaining through membership fees;

service charges; grants from international foundations; and private gifts; and their orientation is much more toward private sector training, particularly in the area of construction training. APHBI expects to add a minimum of five to seven new courses each cycle/year; either new courses or existing, modified courses. There will be a specific Training of Trainers program, asked for by the Technical University of Gdansk and APHBI.

Future HBI courses will likely include: building codes; consumer education to sell the concept of a free market; business management skills; office organization; new zoning implementation. Most of their courses are and will be oriented toward the private sector, however, public sector participants may also benefit from attending. And they could be enhanced to be courses oriented toward the public sector.

Among the courses available through the HBI Graduate Builders Institute are:

Business management

This course gives an overview of the planning process of supervisory structures and financial systems that should be in place before a building project begins. Basic business management functions essential for effective project management are explained, such as internal staffing and directing, handling, reporting and accounting, cost control, and financial recordkeeping.

Computer applications

This course provides guidelines for selecting appropriate hardware and software. Highlights include how computers can assist in accounting, estimating, scheduling, purchase order control, word processing, inventory management, and warranty control.

Land development, site planning, and zoning (2, 9)

This course analyzes the land development process, site planning techniques, and cost-effective development practices, and key issues confronting land developers in today's market. The four basic phases of land development, investment/risk relationships, and successful market research techniques are discussed in detail.

Additional courses are available through the HBI Master Builder Series. They include:

Financial management

In this course students learn how to use strategic planning, budgeting, cash flow forecasts, ratio analysis, income statements, break-even analysis, variance analysis, and reporting systems to improve operations and to increase profits.

Land acquisition and development finance (2)

This course describes how to determine the market, acquire the site, select a lender, prepare a loan application, and choose the best financing alternatives.

### Negotiating

People in the real estate and building industry negotiate daily with customers, employees, subcontractors, suppliers, government officials, and others. This course provides a practice approach to interpersonal problem-solving and suggestions for specific negotiating situations.

## **G. *USAID Supported Courses***

In past USAID-funded programs, there were at least five courses offered by universities in the United States to which USAID has sent representatives. These courses, while not specifically intended for Central and Eastern Europe, might also be considered for Central and Eastern European participation. They are, as follows:

*Housing/settlements/infrastructure in developing countries (5)*, offered by MIT, February to April annually; two weeks minimum, three months maximum. Trainers are the SIGUS Group, special program for visiting practitioners. The course includes workshops, tutorial sessions, and supplementary activities and lectures. Participants are asked to bring their own project or housing program, which is evaluated and developed under faculty supervision, concentrating on physical planning, programming, and design.

*Housing finance training program (4)*, offered by the University of Pennsylvania Fels Center of Government, in May 1993, Philadelphia. This three-week course combines lectures, workshops, field visits, and seminars, and includes computer training. Participants are typically senior- and middle-level government staff of public and private agencies who deal with development of housing finance policy and systems. Limit of 25 participants. This is the seventh year it is being offered. The course addresses functional and institutional building blocks of a housing system; mechanisms for attracting savings into the housing market; allocations of mortgage funds to middle- and low-income groups; role of markets in housing finance systems; types and uses of mortgage loan instruments; management problems in housing finance, and the mathematics of housing finance.

*Public-private partnerships in urban development (3)*, offered from July 7-July 30, 1993, at Harvard University Graduate School of Design in Cambridge. The course has a module format with computer work. Participants are encouraged to use their own projects as cases and are typically middle and senior level professionals responsible for urban and regional planning and the management of urban programs. Topics to be covered this year include: project evaluation techniques, finance management of public investments, urban regeneration and enterprise zones, privatization and management of multifamily housing, and financing affordable housing.

*Financing urban infrastructure and services (5)*, offered from September 13-October 1, 1993, at Research Triangle Park, North Carolina. The course is made up of seminars,

individual or group exercises, and field trips, and limited to 14 participants from three or four countries who should be officials responsible for the formulation and implementation of municipal development policy. Issues addressed include urban planning and municipal administration, public finance, and capital investment decision making.

*Understanding and implementing public/private ventures in urban development and shelter (3)*, offered by Technical Support Services of Washington, D.C., in November 1993. This workshop/seminar focuses on how best to meet the needs of the private investor and public policy maker. Public-sector participants learn how to structure private-sector incentive programs and work with private sector companies to achieve public policy objectives. Private-sector participants learn about potential for investment in shelter and development activities.

#### ***H. Additional Resources***

Among the additional organizations that offer courses that expressed interest in working with USAID in Central and Eastern European training, but have not yet provided more detailed information, are:

#### ***The International Union of Local Authorities-Eastern Mediterranean and Middle East Region (IULA-EMME)***

IULA-EMME, located in Istanbul, works primarily in the area of strengthening local government and democracy and management development. IULA-EMME is currently running, with the OECD, a "Management Development Program" consisting of 12 modules. Among the work in management development that might be of interest are Excellence in Local Government Management, Management of Urban Financial Resources, Project Management, Environmental Management, and Information Technology. Each of these has been or is being developed into a handbook.

#### ***Institute for Public Administration, New York***

Up to this point their focus in Central and Eastern Europe has been working with two institutions and helping them develop a sustained training capacity--Institute for Local Administration in Prague and Institution for Public Administration in Bratislava. They developed and adapted a town management course with a training of trainers component that is now a part of both institutions. They are moving into municipal finance now, in particular budgeting and property tax administration, and are looking for additional funding. They are also looking at land development issues.

#### ***ADEF--Association pour le developpement des études foncières (Association for the Development of Land Studies), Paris***

The ADEF works in conjunction with the laboratoire d'économétrie de l'école polytechnique and has worked with the World Bank. They have expressed interest in working on land tenure and urban development issues in Poland and Hungary. They are beginning to plan future events and would be interested in working with USAID and ULI.

### *Universities*

There are many universities in the United States that have already developed courses in real estate related topics. ULI has identified at least 70 programs that offer courses. It could be worthwhile to consider working with universities, especially one- or two-year real estate development degree programs, for assistance with course development. Among the universities with one- and two-year programs are MIT, Columbia University, University of North Carolina at Chapel Hill, Texas A&M University, and the University of Southern California. In addition, European universities have been developing real estate related courses and some, such as the University of Birmingham, have been involved in Central and Eastern European education. More investigation must be made in looking at European assistance in the areas of housing, municipal finance, and infrastructure, from the private sector as well from higher education institutions.

It is our understanding that USAID has surveyed United States universities to find out about their training capacity and interest in working in this area. We urge that these results be compiled so as to assess the existence of such resources. ULI also maintains files on some 60-70 programs and has established a relationships with many universities and faculty members that could be useful for further work. ULI also has a database of some 1200 real estate related faculty members in the United States and around the world.

## **SECTION IV: RECOMMENDATIONS FOR FOLLOW-ON ACTIVITIES**

Implementation of the recommendations described in this report require a number of follow-on activities. The following is a summary of the recommended action items.

### ***A. Higher education***

1. Complete a survey of Central and Eastern European universities to establish the breadth of courses and instructors that exist.
2. Select the universities that will be targeted in each country.
3. Identify the Western university programs and faculty to establish linkages with.
4. Hold a forum for faculty from Central and Eastern European universities and Western universities to exchange information and establish ongoing communication between these institutions.
5. Identify faculty to develop teaching cases and appropriate subjects for cases considering the technical assistance programs underway.

### ***B. Policy education***

1. Identify policy issues of concern in each of the Central and Eastern European countries.
2. Identify the key individuals involved with the issues identified from the public and growing private sector.
3. Hold forums and disseminate findings.

### ***C. Professional development programs***

1. Agree on a core curriculum in the area of housing and urban development programs that then can be developed for all five countries and presented as demand is identified.
2. Building on the work already accomplished by ICMA in Poland, and continuing to work with ICMA, develop a strategy for implementing a comprehensive professional development program for the five Central and Eastern European countries, in as much as demand will allow subject matter programs to be offered in all five countries. The

implementation steps are as follows:

- Develop timetable for implementation.
  - Identify target audiences and needs, considering the technical assistance programs to be provided in the country at the time.
  - Identify Western professional development programs that can meet the needs determined and customize the programs where necessary to adjust to the unique concerns and cultures of each of the countries.
  - Identify resources for program.
  - Identify indigenous faculty that will be trained to carry on the training over time and concurrently the likely training institutions in the different countries and cities.
3. Identify the needs for study tours and/or workshops in western countries and arrange for attendance or development of tours.

## ANNEX A: PERSONS CONTACTED

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USAID  
Washington, DC

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Home Builders Institute  
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## **ANNEX B: TRAINING SUMMARY**

### ***Description of training already offered in Central and Eastern Europe or presently available***

This section of the report briefly describes training programs for local government officials that have already been offered in Central and Eastern Europe or for Central and Eastern Europeans. This summary includes information on seminars, conferences, workshops, and some participant training programs. It also includes information on some training intended for, but not restricted to, the private sector. The line between the public and private sector is blurred in many cases and certainly in much of the training held thus far, participation has not been limited to either the public sector or the private sector. With that in mind, we have included many programs that may not be targeted strictly to local government personnel, but are programs that encompass subject areas covered under this contract--land development and management; housing privatization and management; infrastructure provision; municipal finance and financing management pertaining to the urban physical environment.

For this initial survey, much of the information was gathered through telephone interviews and, in some instances, is incomplete. The detail of information varied tremendously from source to source and that is evident in the summaries. A more thorough review could be conducted if AID determined it to be worthwhile.

While relatively complete, this list is not exhaustive. Upon completion and distribution of this document, readers can update and supplement the information found herein. The courses are ordered by broad topics--housing, land and environment, and other--and within those areas are ordered chronologically in as much as that was possible. In quite a number of cases, exact dates were not available.

## HOUSING

**Date:** January 1991  
**Location:** Lublin, Poland  
**Title/Topic:** Housing production and rehabilitation  
**Trainer:** MIT School of Architecture and Planning faculty  
**Funding Source:** MIT and USAID  
**Format:** Workshop  
**Participants:** Policy makers  
**Purpose:**

**Date:** May 6-10, 1991  
**Location:** Prague  
**Title/Topic:** Housing policy reform  
**Trainer:**  
**Funding Source:** Caisse des Dépôts, France, and World Bank  
**Format:** Conference  
**Participants:** 27-30 ministers and bankers from Bulgaria, Hungary, Czech Republic, Slovak Republic, Poland, Romania, and Yugoslavia  
**Purpose:** Discussed means and results of housing policy reform. Discussed need for additional training, particularly in the area of privatizing housing stock and eliminating rent control.

**Date:** June 1991  
**Location:** Prague and Bratislava  
**Title/Topic:** Strategies and techniques for privatizing and managing social housing  
**Trainer:** AID consultants/OKM Associates  
**Funding Source:** USAID  
**Format:** Full-day seminar  
**Participants:** Mayors and other local officials  
**Purpose:** Two full-day seminars to familiarize officials with the options for dealing with the transfer of ownership of social housing from the central level to elected local governments. Topics covered included: housing management issues for public and private owners in the United States, functions of housing management, including occupancy, financial, and facilities management.

**Date:** August 1991  
**Location:** Prague 2  
**Title/Topic:** Housing management  
**Trainer:** AID consultants/OKM Associates  
**Funding Source:** USAID  
**Format:** Week-long seminar  
**Participants:** Local government officials, private entrepreneurs interested in starting private management companies.

**Purpose:** Day 1 of the seminar was a training workshop for potential trainers; days 2 and 3 were a training workshop for private management companies, with topics covering housing management company organization and procedures, corporate finances, occupancy management, maintenance management, and financial management; and day 4 covered similar topics as days 2 & 3, but was specifically geared to government staff responsible for the oversight of management of both housing and management companies. Approximately 30 people attended.

**Date:** May 5-6, 1992  
**Location:** Prague  
**Title/Topic:** Housing finance and infrastructure  
**Trainer:** Urban Institute, et al  
**Funding Source:** USAID  
**Format:** Conference  
**Participants:** 132 participants, including bankers, housing sector leaders (public and private), mayors, and other officials responsible for infrastructure development  
**Purpose:** To provide guidance on how to develop appropriate systems for financing housing and infrastructure within the context of an emerging market-oriented financial system.

**Date:** June 14-17, 1992  
**Location:** Kraków  
**Title/Topic:** Housing development and marketing in Poland: issues of feasibility  
**Trainer:** Instructors included Richard Berkman, Aleksander Bohm, Krzysztof Bojanowski, W. Jan Brzeski, Norman Flynn, Joe Hanauer, John Howley, James McKellar, William North, and Andrzej Wyzykowski  
**Funding Source:** Sponsors included the National Association of Realtors, the Cracow Real Estate Institute, USAID, United Nations Centre for Human Settlements (Habitat), the MIT Center for Real Estate  
**Format:** Seminar with lectures, discussions, and case studies  
**Participants:** Primarily upper level local officials. Approximately 100 participants.  
**Purpose:**

**Date:** June 29-July 3, 1992  
**Location:** Lodz, Poland, Regional Training Center, Foundation in Support of Local Democracy and in collaboration with the Lodz School of Local Government and Public Administration  
**Title/Topic:** Communal housing management  
**Trainer:** ICMA consultants--Frederick Lamont, Deborah Erlanson, and Veronica Bukowski--and two Polish consultants/trainers--Andrzej Piaskowski and Janusz Kot  
**Funding Source:** USAID  
**Format:** Seminar with lectures, case studies, group exercises, discussion, and simulations  
**Participants:** Twenty-three participants, including elected and appointed local government officials and communal housing managers from 11 cities  
**Purpose:** To establish a group of Polish trainers who would provide similar training throughout

Poland on the following topics: the theory and analysis of housing systems, the emerging issues and challenges in the current Polish communal housing systems, the changing responsibilities of Polish local officials and housing managers during the transition to the market economy, communal housing management technology and costs, and the relative advantages of public and private organizational structures.

**Special Notes:** Development of course materials involved the ICMA consultants making an early trip to Poland and the Polish consultants/ trainers coming to the United States to work with the American specialists in designing materials and learning first hand about housing management issues.

**Date:** Mid-1992 (exact date unknown)

**Location:** Budapest

**Title/Topic:** Inner city rehabilitation

**Trainer:**

**Funding Source:** Four Dutch organizations

**Format:** Seminar

**Participants:** District and municipal government officials

**Purpose:** Discuss inner city rehabilitation and ensuing questions about architecture, financing, and social consequences

**Date:** September 1992

**Location:** Prague

**Title/Topic:** Housing management

**Trainer:** OKM and Association of Towns and Cities

**Funding Source:**

**Format:**

**Participants:**

**Purpose:**

**Date:** September 1992 and November 1992

**Location:** Budapest

**Title/Topic:** Rental policy and housing allowance issues

**Trainer:**

**Funding Source:** Ministry of Housing, Germany (among others)

**Format:** Conference

**Participants:** 50-70 central and local government officials, primarily from Budapest

**Purpose:** Two days covering rental policy, housing allowance issues, legal problems, and social problems using the German and American experience as the case studies

**Date:** September 28-October 3, 1992

**Location:** Lodz, Poland, Regional Training Center, Foundation in Support of Local Democracy

**Title/Topic:** Local revenue sources

**Trainer:** ICMA consultants and Polish trainers

**Funding Source:** USAID  
**Format:** Seminar  
**Participants:**  
**Purpose:** Designed to familiarize participants with alternative tax and non-tax sources for financing housing and related infrastructure; the most appropriate mix of taxes and service charges for funding such improvements; strategies for controlling the cost of collecting and enforcing revenue laws; procedures for preparing governmental and operating budgets; and capital improvement planning and debt management

**Date:** Mid-October 1992  
**Location:** Szolnok, Hungary  
**Title/Topic:** Asset and property management  
**Trainer:** Toni Baar (with translator)

**Funding Source:** USAID  
**Format:** Five-day training course (3 hours daily)  
**Participants:** 12-15 participants from public and private sector  
**Purpose:** To train in principals of asset and property management to emphasize need for monitoring of housing stock and systematization of management procedures

**Date:** December 1992  
**Location:** Budapest  
**Title/Topic:** Local housing strategy  
**Trainer:** Hungarian trainers from the private sector

**Funding Source:** USAID  
**Format:** Five-day seminar  
**Participants:** Half from Budapest, half from other cities (amount unknown)  
**Purpose:** To provide training to local government officials in the rental sector, housing finance, housing development, and the development of a local housing strategy. The curriculum material (developed by Robert Dubinsky, Katharine Mark, and Iván Tosics) includes printed matter and computer software for housing finance, development, housing needs assessment, and privatization.

**Date:** December 8, 1992 and December 14, 1992  
**Location:** Czech Republic and Slovak Republic, respectively  
**Title/Topic:** Rent control and tenant rights  
**Trainer:**

**Funding Source:** *Ekonom* and USAID  
**Format:** Conference  
**Participants:**  
**Purpose:** To provide information on rent control and tenant rights, particularly general principles and advantages of market-oriented housing systems and assistance programs to protect tenants; alternative methods of phasing out rent controls; and alternative systems of tenants rights in

Western Europe.

**Date:** January 16, 1993  
**Location:** Budapest  
**Title/Topic:** Condominium management training  
**Trainer:** UI/CHF/LOSZ  
**Funding Source:** USAID  
**Format:** Training course  
**Participants:** Training course for board members, managers, and unit owners in newly privatized condominiums  
**Purpose:** Although it was developed for the private sector, it was decided that it should be offered for the public sector as well because the local government, as former owners, still has an interest in the success of management of privatized housing.  
**Special Notes:** Are planning two more offerings in Budapest. Developed a comprehensive manual working with five Hungarians.

**Date:** January 28-29, 1993  
**Location:** Gdansk, Poland  
**Title/Topic:** Housing training needs  
**Trainer:** HBI/APHBI and local private training institution  
**Funding Source:** USAID  
**Format:** Primarily roundtable discussion  
**Participants:** 30-35 administrators, construction contractors, developers, city planners, architects  
**Purpose:** Moderated discussion to assess their training needs. Program opened with a talk on site planning presented by staff member from the National Association of Home Builders. Used to raise issues which they could then discuss. Identified areas of training needed: sales and marketing of real estate, management, property, business management, construction, new technologies and methods, recycling, and financing.

**Date:** January 12, 1993 weekend  
**Location:** Las Vegas, Nevada  
**Title/Topic:**  
**Trainer:** HBI  
**Format:** National Association of Home Builders Annual Convention  
**Participants:** 20 people from Poland and 10 from the Slovak Republic (approximate numbers); group included ministers of construction to builders and developers.  
**Purpose:** Visited building sites in Las Vegas, home improvement centers, seminars, exhibits, etc. Learned more about how associations are run.

**Date:** February 25-March 5, 1993  
**Location:** Salt Lake City and Park City, Utah  
**Title/Topic:** Mid-Winter Conference on Housing Finance  
**Trainer:** Richard Pratt Associates



**Funding Source:**

**Format:** Workshop and seminar

**Participants:** NIS/Central and Eastern European Delegates

**Purpose:** To inform government officials involved in the housing and financial sectors and the management of current and potential mortgage lending institutions on mortgage finance and lending policies, practices, and procedures.

**Date:** Week of March 1, 1993

**Location:** Budapest

**Title/Topic:** Inner city housing rehabilitation

**Trainer:**

**Funding Source:** Ministry of Housing, Germany (?)

**Format:**

**Participants:** Small group of public sector and private sector individual, among them the chief architects of the inner city of Budapest

**Purpose:** Discuss architecture, finance, and social consequences of rehabilitating the inner city housing.

## LAND AND ENVIRONMENT

- Date:** November 1991  
**Location:** Budapest  
**Title/Topic:** Land use planning and environmental management  
**Trainer:**  
**Funding Source:** Supported by private firms and organizations in Canada and Hungary, but organized by the Canadian Urban Institute  
**Format:** Seminars and workshops  
**Participants:**  
**Purpose:** Exchange of information
- Date:** February 1992 (completion date)  
**Location:** Warsaw, Gdansk, and Olsztyn, Poland  
**Title/Topic:** Land use and environmental management  
**Trainer:** Canadian Urban Institute  
**Funding Source:** Canadian Urban Institute, funded primarily by External Affairs and International Trade of Canada  
**Format:** Seminars and workshops  
**Participants:** Municipal officials  
**Purpose:** Initial set of workshops and seminars were designed to identify the type of comprehensive municipal training that would best suit the Polish environment.
- Date:** February 1992  
**Location:** Budapest  
**Title/Topic:** Economic and planning considerations in land development  
**Trainer:**  
**Funding Source:** Supported by private firms and organizations in Canada and Hungary, but organized by the Canadian Urban Institute  
**Format:** Seminars and workshops  
**Participants:**  
**Purpose:** Exchange of information
- Date:** February 1992 (completion date)  
**Location:** Prague and Bratislava  
**Title/Topic:** Land use and environmental management; and public-private sector relationships  
**Trainer:**  
**Funding Source:** Canadian Urban Institute  
**Format:** Training  
**Participants:** Local officials  
**Purpose:**
- Date:** April 1992

**Location:** Budapest  
**Title/Topic:** Multi-tier governments, land development, and the role of professional associations  
**Trainer:**  
**Funding Source:** Supported by private firms and organizations in Canada and Hungary, but organized by the Canadian Urban Institute  
**Format:** Workshops  
**Participants:**  
**Purpose:** Exchange of information

**Date:** June 8-12, 1992  
**Location:** Kraków Regional Training Center, Foundation in Support of Local Democracy  
**Title/Topic:** Land use planning  
**Trainer:** ICMA consultants--Jan Winters, Cheryl Farr, and Jan Potocki--and two Polish consultants/trainers--Zygmunt Ziobrowski and Aleksander Bohm  
**Funding Source:** USAID  
**Format:** Seminar with lectures and case studies  
**Participants:** Twenty-four participants, including local government officials, urban planning specialists, and academic experts from 15 cities  
**Purpose:** To establish a group of Polish trainers who would provide similar training throughout Poland on the following topics: planning in a market economy, land use controls and area planning, planning and financing infrastructure, citizen participation in planning, and the development of strategic plans.  
**Special Notes:** Development of course materials involved the ICMA consultants making an early trip to Poland and the Polish consultants/trainers coming to the United States to work with the American specialists in designing materials and learning first hand about land use planning issues.

**Date:** June 1992  
**Location:** Budapest  
**Title/Topic:** Local government, land use planning, and public participation  
**Trainer:**  
**Funding Source:** Supported by private firms and organizations in Canada and Hungary, but organized by the Canadian Urban Institute  
**Format:** Workshops  
**Participants:**  
**Purpose:** Exchange of information

**Date:** July 23, 1992  
**Location:** Prague  
**Title/Topic:** Municipal land disposition: strategies, rationales, and policy  
**Trainer:** Urban Institute  
**Funding Source:** USAID  
**Format:**

**Participants:** Approximately 20 vice mayors and policy makers from Prague??

**Purpose:**

**Date:** July 1992 (completion date)

**Location:** Poland and Hungary (exact cities unknown)

**Title/Topic:** Municipal and environmental training

**Trainer:** Government of Ontario

**Funding Source:** Canadian Urban Institute

**Format:** Lectures, workshops, and in-house training

**Participants:**

**Purpose:**

**Date:** October 1992

**Location:** Budapest

**Title/Topic:** Urban management and the environment

**Trainer:** Canada Urban Institute

**Funding Source:** External Affairs and International Trade of Canada and several private sector firms

**Format:** Workshops and in-house training sessions

**Participants:** Public officials

**Purpose:** To educate on the following topics: structure and function of local governments, land development and land use planning, environmental protection and management, public participation and conflict resolution, municipal finance and taxation, economic development, market feasibility and property development, and GIS.

**Date:** November 17-19, 1992

**Location:** Paris

**Title/Topic:** Land tenure and urban development in Central and Eastern Europe

**Trainer:** Sponsored by the French Ministry of Public Works and Housing; Caisse des Dépôts, and Association for the Development of Land Studies (ADEF of Paris)

**Funding Source:**

**Format:** Conference/workshop

**Participants:** Approximately 70 participants, primarily high level officials from Budapest, Bucharest, Warsaw, Prague, Bratislava, Sofia, Moscow, and St. Petersburg, as well as France, the Netherlands, Germany, England. World Bank representatives also participated.

**Purpose:** Purpose was to address land management issues in Central and Eastern Europe. Scope of conference ranged from property rights, securitization of tenure, land registration, land developments, and public-private partnerships in land development. Participants presented their own experiences and attempted to establish their own agenda. Several countries expressed need for similar workshops for country focused land management issues or region and city level work.

## OTHER

- Date:** November 1991  
**Location:** Prague  
**Title/Topic:** Ownership and management privatization  
**Trainer:** AID consultants/OKM Associates  
**Funding Source:** USAID  
**Format:** Week-long series of seminars with a combination of lecture and activity based training.  
**Participants:** Local government officials and private entrepreneurs. Approximately 20-30 attendees each day.  
**Purpose:** Two seminars. The first seminar, on ownership privatization, focused on life cycle of construction (production, operating, and capital implications), ownership options, ownership privatization tools, establishing value, financing a purchase, soliciting purchasers, and legal issues. The second seminar, on management privatization, focused on management options, soliciting tenant management, soliciting private management, selecting private management, contracting private management, and monitoring management.
- Date:** February 17-21, 1992  
**Location:** Kraków, Poland, Regional Training Center of the Foundation in Support of Local Democracy  
**Title/Topic:** Property valuation: urban economics for city managers and planners  
**Trainer:** ICMA consultants--Marc Lourgand, Joseph Eckert, and Robert West--and two Polish consultants/trainers--Krzysztof Bojanowski and Adam Eliasiewicz  
**Funding Source:** USAID  
**Format:** Seminar with lectures and case studies  
**Participants:** Twenty-five participants and two observers, including municipal specialists and senior level decision makers; bankers; housing construction professionals; and academic experts from 14 cities.  
**Purpose:** To establish a group of Polish trainers who would provide similar training throughout Poland on the following topics: real estate in a market economy, factors affecting real estate value in a market economy, the valuation of individual properties, and the transformation of Poland's real estate market  
**Special Notes:** A follow-up workshop for individuals who wanted to be trainers was held at the Kraków RTC April 27-29. Instructors were Krzysztof Bojanowski and Adam Eliasiewicz. Development of course materials involved the ICMA consultants making an early trip to Poland and the Polish consultants/trainers coming to the United States to work with the American specialists in designing materials and learning first hand about property valuation issues.
- Date:** August 28-29, 1992, and August 31-September 1, 1992  
**Location:** Prague and Bratislava, respectively  
**Title/Topic:** Technical services in the market transition  
**Trainer:** Price Waterhouse employees and academics from Harvard, as well as specialists from the

city of Phoenix and the World Bank

**Funding Source:** USAID with ICMA/USAID funding participants

**Format:** Two-day seminar with lectures and group planning sessions

**Participants:** 42 in Prague and 34 in Bratislava. Mostly upper level public sector employees and elected officials.

**Purpose:** Guiding mayors and other decision makers toward making the decision of whether or not to privatize municipal services

**Date:** October 5-9, 1992

**Location:** Rennes, France

**Title/Topic:** Strengthening local government in Central and Central and Eastern Europe

**Trainer:**

**Funding Source:** World Bank, French Ministry of Foreign Affairs, Caisse des Dépôts, and Crédit Local de France

**Format:** Seminar

**Participants:** 35 participants and two observers--13 representatives from local government, 18 from central government, and six representatives from lending institutions. Representatives attended from Bulgaria, Czech and Slovak Republics, Hungary, Poland, Romania, and Turkey.

**Purpose:**

**Date:** February-March 1993

**Location:** Washington, D.C.

**Title/Topic:** Establishing associations

**Trainer:** NAHRO/NLC/NATAT

**Funding Source:** Rutgers Foundation for Democracy

**Format:** Two-part assistance: Representatives from NAHRO, the National League of Cities, and the National Association of Towns and Townships met with equivalent groups in Poland to work with them in enhancing organizational effectiveness. Then brought Polish representatives to United States to work on organizational issues and to familiarize them with United States situation. Teams were sent to Pittsburgh and Baltimore to see how older United States cities dealt with changing from a manufacturing economy and with deteriorating housing stock. Another team was sent to southern Virginia to see how base closings were being handled.

**Participants:** Polish representatives from equivalent organizations (NAHRO, NLC, NATAT)

**Purpose:** Information exchange on non-profits, changing markets,

Additional local government training has been done by UNCHS (Habitat) and Sister Cities International. Below is a summary of those activities.

### ***United Nations Centre for Human Settlements (Habitat)***

Five interrelated training activities were organized by UNCHS (Habitat) in Central and Eastern Europe during the period of April 1991-May 1992. The impetus for these activities came from a request by the Government of Hungary in April 1991. The activities were implemented in accordance with the UNCHS Training and Capacity-Building Strategy, with minor variations, as follows:

Step 1 Assessment of training needs and capacities: A mission was undertaken by the UNCHS Training Unit in May 1991 to Hungary, Slovakia, and Poland to assess training needs and training capacities. This mission resulted in, the decision to organize a pilot Training of Trainers course for local government management.

Step 2 A course and curriculum design workshop: This was held in Budapest, in September 1991 involving UNCHS Training Unit, a consultant, and representatives from Hungary, Slovakia, and Poland. The objectives of the workshop were: (1) to identify trainers to be trained, (2) to design the TOT course in function of needs identified, and (3) to identify training support materials.

Step 3 Preparation of training materials and course curricula: During the period October-December 1991, country teams (trainers) worked on training materials which consisted of the adaption and translation of two existing manuals, one on Managing Change for Trainers and Urban Managers, and the other Designing Effective Training.

Step 4 National preparatory TOTs: Three two-day TOT workshops were implemented by the consultant in Hungary, Poland, and Slovakia in January-February 1992. The objectives of these workshops were: (1) To acquaint trainers with adult learning methods, and (2) to identify data requirements on local government management issues and problems.

Step 5 Regional TOT: A regional TOT involving 22 trainers in four national teams was held in April-May 1992, in Veszprem, Hungary. The course was implemented by a team consisting of a senior Hungarian trainer, the Chief of UNCHS Training Unit, and a consultant. The TOT focused on the following issues:

1. Management and organization development: Problem identification, analysis and solving; power, influence, and leadership; culture and management.
2. Training design and practice: Experiential learning, participant-led training, interactive training delivery.
3. Action planning and preparation of country follow-up activities.

The breakdown of the participants is as follows:

By country: Hungary (11), Poland (5), Romania (3), Slovakia (3)

By function: Local government (8), central government (3), universities/training organization (11)

By profession: Architects/planners/engineers (15), economists (2), public administrators (2), geographers (1), sociologists (1), lawyers (1).

Step 6 Follow-up and multiplier activities: This step, owing to resource limitations, does not benefit from UNCHS support, and is still in the process of implementation.

### ***Sister Cities International***

Sister Cities International (SCI) received a grant from USIA in April of 1990 to administer and coordinate a municipal exchange program between cities in the United States and regional municipal training centers in Poland. In April of 1991, the program was expanded to include US/Hungarian partners as well.

Working with the Polish Foundation in Support of Local Democracy (FSLD), SCI identified 14 US cities as suitable partners for an equal number of regional centers training newly elected local government officials in Poland. In addition, three other similar links with Polish cities are being supported by SCI. In Hungary, SCI is supporting cooperation to strengthen local democracy through direct city to city linkages.

A typical exchange consists of a formal expression of needs by the overseas side, followed by a planning visit to the US, to be followed by one to two month internships for overseas trainers and local government workers in appropriate local government offices and service organizations in the US city. A wide array of activity has taken place since 1990 between the sister cities of Poland and Hungary.

The primary purpose of SCI is to set up a mechanism for exchange of municipal expertise and experience. Much of the SCI training is in broader municipal administration issues, however, some is directly related to housing and community development. Listed below are the exchanges established and where applicable, the training activities that occurred.

#### **POLAND**

**1. Buffalo/Rzeszow**

**2. Charlotte/Wroclaw**

In March of 1993, Charlotte hosted three environmental specialists to observe local waste disposal, water quality, and environmental education.

**3. Chicago/Warsaw**

**4. Cleveland/Gdansk**



**5. Flint/Kielce**

**6. Maryland, State of/Lodz**

A visiting fellow from the University of Lodz studying at Johns Hopkins University in Baltimore, assisted a state committee with planning a program that allowed Maryland to provide five-week internships for eight officials and trainers from Lodz in November 1990. The Poles focused on environmental protection, local government operations, interaction with the private sector and media, urban planning, economic development, and local fiscal policy. Four of the participants were from the Lodz regional training center, while the remaining four were City of Lodz officials.

A six-member delegation travelled from Maryland to Lodz during November of 1991. Topics discussed included sewage treatment, solid waste disposal, water purification, local finance, and city planning. A city planner from Annapolis went to Lodz in October of 1991 to work with that city's planning department, and will continue to work in Lodz in 1993. A number of Lodz specialists from the city departments of Economic Development, Planning, and Environmental Protection will travel to Maryland in March/April 1993 to observe operations in areas of specific interest.

**7. Milwaukee, County of/Bialystok**

Bialystok sent a five-member delegation comprised of training center staff and city officials to Milwaukee in March of 1991. This planning group spent two weeks visiting State and local government offices, business and academic leaders and discussing future cooperation. Two individuals from the FSLD Training Center visited Milwaukee for six weeks during September/October 1992 to study elections, political consensus building, and public participation in creating and approving local government budgets.

**8. Mobile/Katowice**

**9. Rochester/Krakow**

Krakow officials spent three weeks in February of 1993 studying traffic engineering, administration of city departments, and communications.

**10. St. Louis/Szczecin**

Szczecin and St. Louis signed a Sister City arrangement in October of 1992. Present were the Mayor of Szczecin and two employees of Szczecin's urban planning department. The two planners stayed on for a six-week period to learn about St. Louis's efforts in city planning, economic development, and other issues. All costs of this visit were raised by the St. Louis Sister Cities Committee.

**11. St. Paul/Minneapolis/Lublin**

**12. Tempe/Bydgoszcz**

Bydgoszcz will send four individuals to Tempe in April 1993 to study budget preparation, interdepartmental communication, personnel, selection, urban planning, and computerization.

**13. Toledo/Poznan**

**14. Tyler, Texas/Jelenia Gora**

**15. Fort Wayne/Plock**

**16. Grand Rapids/Bielsko-Biala**

**17. Philadelphia/Torun**

### *Planned Training Activities*

The courses and conferences listed below are planned specifically for Central and Eastern European training. Please note that in many cases, information on the planned courses is incomplete or not comprehensive.

- Date:** February-August 1993  
**Location:** Gdansk, Poland, Technical University of Gdansk  
**Title/Topic:** Academic expertise for curriculum development  
**Trainer:** James Canestaro, Alex Krieger, Rodolfo Machado, Francois Vigier  
**Funding Source:** USAID  
**Format:** Team of experts providing assistance  
**Participants:** Work with Gdansk Faculty of Architecture  
**Purpose:** To assist in the formulation of a new curriculum; identify and develop a limited number of pilot courses for architecture and planning students in: formulating urban development strategies, assessing the financial feasibility of real estate projects, and concepts of public/private partnerships; assess any need for further training of Gdansk faculty counterparts.
- Date:** March 13, 1993 (tentative date)  
**Location:** Lodz, Poland  
**Title/Topic:**  
**Trainer:** HBI  
**Format:** One-day seminar  
**Participants:** Public and private sector; as identified by Ewa Oziewicz of APHBI  
**Purpose:** Probable topic is environmental issues
- Date:** April 23, 1993  
**Location:** Budapest  
**Title/Topic:** Housing allowance seminar  
**Trainer:** Being offered in conjunction with Ministry of Social Welfare  
**Funding Source:** USAID  
**Format:** One-day seminar  
**Participants:**  
**Purpose:** How to implement a housing allowance program
- Date:** May 1993  
**Location:** Warsaw, Gdansk, Kraków, Lodz, and Kielce (locations not finalized)  
**Title/Topic:**  
**Trainer:** HBI  
**Funding Source:** USAID  
**Format:** Two one-day seminars run back to back

**Participants:** Public and private sector mix  
**Purpose:** Computerized estimating; finance.

**Date:** May 14-16, 1993  
**Location:** Szczecin, Poland  
**Title/Topic:** Economic development  
**Trainer:** Community Development Training Institute  
**Funding Source:** German Marshall Fund  
**Format:** Workshops to be held along with a business meeting to form a Polish Economic Development Association  
**Participants:** Local officials primarily.  
**Purpose:** To set up a Polish Economic Development Association and provide training in the following four areas: overall economic development strategies as they relate to investment activities of the public and private sectors; providing assistance to private sector investment to ensure a mutually beneficial atmosphere; land development and disposition; and municipal marketing strategies for promoting economic development potential.

**Date:** October 1993  
**Location:** Gdansk  
**Title/Topic:**  
**Trainer:** HBI  
**Funding Source:** USAID  
**Format:** Number of two-day seminars to be offered during the Builders Fair in Gdansk  
**Participants:** Public and private sector mix  
**Purpose:** Sales and marketing course (based on NAHB's Institute of Residential Marketing's course); computer course for instruction in CAD and GIS; new construction/management technology course

Among the training programs planned, but not scheduled, are HBI's program to bring real estate professionals from Poland to the United States for site visits and training, and possible student exchange programs in the summer of 1993. Their target audience is vocational school high level students and parents (many of whom are from the construction industry) and Technical University of Gdansk students, particularly in computer-related training.

Additional training is planned and underway by the Canadian Urban Institute, which has a year-long exchange program with Poland on municipal training and environmental management taking place in Olsztyn. Among the problems being worked on are housing development, planning and approval process, sewage treatment and waste management, and tourism development. CUI is also conducting a year-long assistance program for Hungary. Beginning in January 1993, Canadian experts will be placed in Hungarian municipalities and private organizations for a total of 15 one-month placements and commencing March 1993, 15

Hungarian officials will be placed in Canadian municipalities for one-month periods to expose Hungarian decision makers to the Canadian decision making process.

The Participant Training Project for Europe (PTPE) for the Partners for International Education and Training (PIET) has specified training in three priority areas: economic restructuring, democratic institution building, and quality of life (including housing management); to provide quality short-term technical training programs to the following countries: Albania, Bulgaria, The Czech and Slovak Republics, Estonia, Hungary, Latvia, Lithuania, Poland, and Romania. Proposals are currently being considered.

## ANNEX C: BIBLIOGRAPHY

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